Wisconsin

ServicePoint

GUIDE

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GETTING STARTED

Implementation of ServicePoint is for single agency use as well as multiple agencies across a community. Individual agencies using ServicePoint will find that it simplifies the process of collecting client data, creating and managing case plans, and building detailed client and service reports. The real power of ServicePoint, however, lies in the ability for it to bring together data from many different agencies, thus providing a single point of entry for client, service, and resource data.

Getting Started

Minimum Recommendations

Workstation requirements

- Pentium class PC, or 1.0 GH or higher
- 128MB RAM
- Microsoft Internet Explorer 5.5+ or Netscape 6+ browser
- Internet connectivity
  - A. Medium to High Volume *(15 or more WISP transactions a day)* = DSL or Cable Modem
  - B. Low to Medium Volume *(Less than 15 WISP transactions a day)* = (minimum 56k connection)
- Windows 2000 or XP

Under the above mentioned conditions, those who have no choice but to run Windows 98 machines will find that Explorer will shut down when checking in a client or running bed reports. Netscape Navigator and Mozilla will work very slowly, but do not actually stop working altogether. Therefore, the recommendation is that they use Windows 2000 or XP (1 Gigahertz models or faster) as the Windows platform to eliminate this problem.

User requirements

- Proficient with Microsoft Office.

Logging In

To access Wisconsin ServicePoint (WISP), use the following URL or web address.

http://wisconsin.servicept.com

- **Logging In**

Enter your user name and password.

If this is the first time you are logging in; use the temporary password assigned to you. A prompt will tell you to choose your own password immediately after you login. This password is yours only. If you are logging in for the first time, you must also agree to the terms and conditions for site use before continuing.

1. Passwords must be 8 to 16 characters in length and must contain at least two numerals and letters somewhere in the password.

2. Your password will expire every 45 days. A prompt appears when you need to choose a new password. You cannot reuse the same password.

- **Security**

Security is of the utmost concern when using WISP. Your database contains sensitive client data that you need to guard. Please take great care to insure that your password is secret (known only to you). Do not share your password or account with another user. Do not write your password down -- memorize it! *Never let your browser store your password*. Having the browser remember your password is equivalent to telling your password to everyone in the office. If you see a prompt offering to save your login information, always answer "no" or "never for this site." If you inadvertently allow your password to be stored, you should erase the stored password right away and change your password.

If you forget your password, notify your agency administrator to receive a new temporary password.

- **Logging off**

You should log out of the system anytime you walk away from your computer. To log out, click on the green "Logoff" button located in the upper right area of the screen.
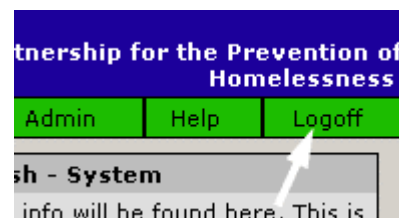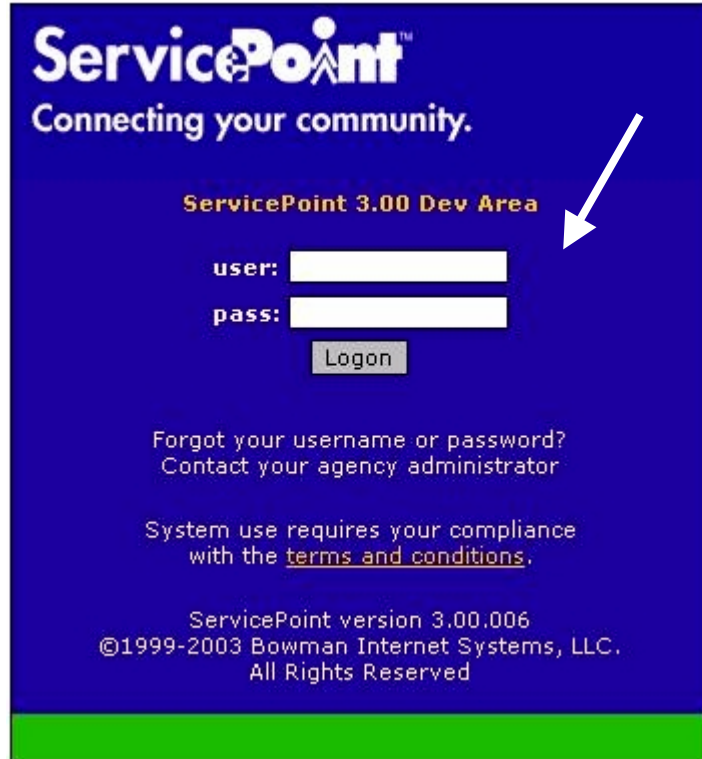
Getting Around Wisconsin ServicePoint

Home

The first screen you see after logging in is the **Home page**. The Wisconsin ServicePoint logo is on the top left hand side of the screen and the name of your Provider group and the date are on the upper right hand side. Immediately beneath the Provider group is the "Child Provider" for which you as a user have permission to enter data. If you have permission to enter data for more than one program, the phrase "Click **here** to enter data as another provider" is beneath the name of your program. All of the above information is located in the dark blue portion of the Home screen.

The next level is the navigation bar, which is divided into tabs. The tabs are green unless selected and then they turn light gray to indicate that you have selected a specific module. In addition to the navigation tabs, there is a navigation box directly below and to the left-hand side of the screen. This box not only displays links to the various modules, but also explains the purpose for each one. You can also use these links to navigate within the system .

Directly to the right of this box is the **"Newsflash-System"** box. The System Administrator is the only individual allowed to enter messages here. The messages are intended for all WISP agencies in the State. The box below entitled "Newsflash-Agency" is for the Agency Administrator and/or Executive Director to enter messages for users within your agency.

The bottom left hand side of the screen displays the "Follow-up List." This allows users to view the listing for the follow-ups they have set for clients under Services Provided, Goals set, and Action Steps set. The list shows the client's name, the type of follow-up, the date set for follow-up to be completed and the number of days remaining before the anticipated follow-up date. The date and the word "Past" will be in red if the date has passed. The follow-up will remain unless the user selects "yes" or "no" to the question, "Follow-up Made?"

Note: By selecting "No" to the question "Follow-up Made?" the user is indicating a decision not to proceed with the follow-up contact.

To view or edit a follow-up from the list, the user must do the following.

- Click on the "Type" of follow-up.

    1. Clicking on a "Service" type brings the user to the Service item page. Click the edit "pencil" for the "Services Provided for Need Identified."

    2. Clicking on a "Goal" type brings the user to the Goal page on which the follow-up questions are visible.

    3. Clicking on the "Action Step" type brings the user to the Goal page. Click the edit "pencil" for the "Action Steps Planned."

- Edit or view the follow-up questions. Click the "Save" button.

Note: If the user wishes to maintain the client's name on the follow-up list indefinitely, <u>do not</u> answer the question, "Follow-up Made?"

- **Entering Data for Multiple Programs**

Wisconsin ServicePoint (WISP) allows a user to log in under their agencies account and select various programs or sites for which to record data during a single session. Under the agency/Provider designation, the user can enter data for various programs and subprograms.

1. Look in the upper right hand corner of the screen and click where it says: "Click here to enter data as another provider."

2. After clicking on "here," a popup box will appear listing the Providers or Programs for which this user may enter data. The user should select the Provider or Program desired.

3. The user verifies the desire to change Providers or Programs by answering "OK" to the question, "Are you sure you want to change to this provider?". The message in the upper right hand side of the screen will now read, "Entering data as: <u>(name of program selected).</u>"

4. To return to the default Provider, click on the name in red and a popup box will appear with the default Provider listed.

> *Note: When entering data for multiple clients served by multiple providers (programs), <u>REMEMBER</u> to change the program as you move from client to client and program to program. Be very careful to avoid creating a database filled with misinformation by not being in the right program when performing data entry.*

- **Navigation**

A tabbed system is the basis for WISP'S navigation. Along the top of the application is a green tabbed bar representing the major sections within WISP. The gray tab indicates the section you are in currently. This navigation will follow you throughout the WISP application.
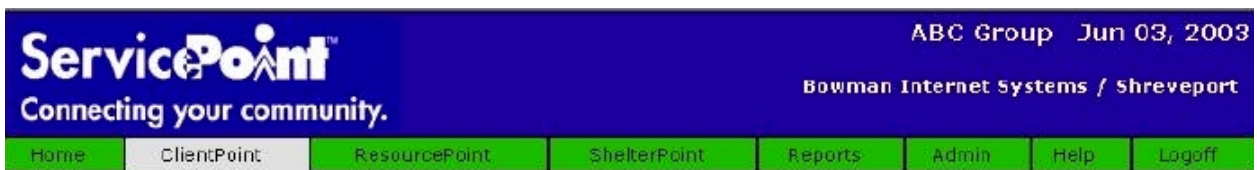
- **Icons to Look For**

  View-   View a data record

  Edit-   Edit a record

  Delete-   Delete a record

   Previous Info   H Access historical data on this question

  Create a Goal in an Assessment   G

  Age of Question   Indicates the age of a given answer in the assessment.

  Open-   Record open to all users

  Open with Exceptions-   Record open to all except designated agencies

  Closed-   Record closed to everyone but your agency or program

  Closed with Exceptions   - Record closed to everyone but designated agencies or programs

- **Types of Questions**

  Date Fields-   Enter date fields in the format of either M/D/YYYY or MM/DD/YYYY.

  Text fields-   Text fields accept any free-form data. The maximum characters allowed in a text field will vary with each field.

  Checkboxes-   Checkboxes allow you to select more than one option. You may select all the checkboxes that apply.

  Radio Buttons-   Radio buttons only allow one selection. You should choose the most correct answer.

  Picklists-   Picklists simplify data entry. If you come across a picklist field that does not have an appropriate choice, please contact your system administrator who can add additional items.

- **Color of Answer Boxes**

 **White-**   After as question has been answered and the assessment saved, if the box that contains the answers is white then that assessment is open to other agencies.

  Tan-   After as question has been answered and the assessment saved, if the box that contains the answer is tan then that assessment is closed to other agencies.

- **Saving Data**

  Always remember to save your work! You will find a "SAVE Changes" button on most pages in WISP both at the top of the page and at the bottom. Moving within a client's file will trigger an automatic "SAVE."
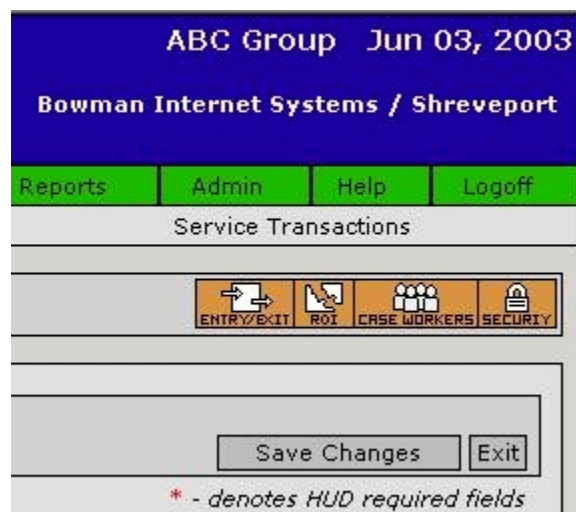
- **Using the 'BACK' and 'FORWARD' Buttons**

  When you click 'BACK' in my browser, you will receive the error 'Warning: Page has Expired'. This is due to the way in which ServicePoint ensures that you are looking at the most up-to-date information. To avoid this error, *please refrain from using the 'BACK' and 'FORWARD' buttons on your browser to navigate from page to page within ServicePoint.* Use the controls on the web page instead.

CLIENTPOINT

ClientPoint allows you to create a client profile for each client your agency sees, assess the needs of each client, create a case plan, and record services and referrals made. Reports can be generated based upon the information entered about your clients.

Creating a Client Record

Adding a new Client

- To open ClientPoint, click on the green "ClientPoint" tab. Notice how the tab turns gray -- the grayed tab indicates where you are in WISP.

- The first ClientPoint screen allows you to either enter a client or search for an existing client record. **You use the same screen to add or search for a client already in the database.** WISP will search the database for an existing client record before creating a new record for your client. Check all possible matches at the top of the screen before creating a new record. This helps insure duplicate records are not created.

1. Complete the form with your client's information

    1. **First Name, Middle Initial, and Last Name**
    2. **Date of Birth** (enter in MM/DD/YYYY format such as 02/25/2003)
    3. **Social Security Number**
    4. **Sex**
    5. **Race** - refers to the client's genetic makeup and physically observable characteristics
    6. **Ethnicity** - the client's social background
    7. **Search Filter** - this is only used if you are searching for a client record. Check this box if you'd like the system to find only exact matches of the name. If not checked, the system will find clients with similar first or last names.

> **Note:** Start your search for the client by entering their last name in the Add/Find a Client name field. If a large number of names come up in Possible Matches, refine your search by adding the person's first name.

2. Click on "Add / Find Client" to continue.

3. Wisconsin ServicePoint checks the database for an existing client record with the same name or social security number.

4. All possible matches will be listed.
    1. If a match is listed, click on the client's name to use the existing client record.
    2. If no match is listed, you can add further identifying information to refine your search.
    3. If no match is listed, click "Add Client with this Information" button.

> ***Special Note*** - Several fields are critical to creating a client record: First Name, Last Name, Date of Birth, and Sex. These fields are used by the system to generate a unique identifier for your client. The unique identifier helps provide unduplicated counts and accurate reporting of your client data. Some examples:
> - ★ Client Josh Johnson, 12/20/1954 birthday, sex is male = Unique ID is jjhm12201954.
> - ★ Client Jane Doe, no birth date provided, sex is female = Unique ID is jdef00000000.
> - ★ Client Sally Smith, no birth date provided, no sex provided = Unique ID is ssi00000000.
>
> The more data you provide, the more unique the ID will be and the less likely a duplicate record will be created. .

Profile

The client record now exists. Enter additional information about the client in the assessment that is attached to the basic Client Profile. For many programs this attachment will either be the Wisconsin Assessment or the Wisconsin Medical Assessment and will contain the HUD and State required data fields.

Types of questionsin the assessments:

- **Integer-**a field that allows for entry of whole numbers.
- **Textbox-**allows entry of one line of text.
- **Text area-**allows for entry of multiple lines of text and can store up to 4,000 characters.
- **Date-**is a valid date.
- **Lookup-**is a picklist, or dropdown box
- **Yes/No-**is a Yes or No question with only one answer possible.
- **Sub-assessment** allows questions that could have many answers that need to be stored together historically. For example, if you ask for a list of schools attended, the client could have several records, or entries, to the question over time.
- **Money-**is a number expressed in US currency.

Households

The next step in creating a client record is to add the individual to a household unless the person is not part of a household. This could be a new household you create, or an existing household already in the system.

Before you begin, you must understand what constitutes a "household." The household composition provides a count of persons. According to the U.S. Census Bureau, "a household consists of all people who occupy a particular housing unit as their usual residence, or who live there at the time of the interview and have no usual residence elsewhere. Households include not only occupants related to the householder but also any lodgers, roomers, boarders, partners, wards, foster children, and resident employees who share the living quarters of the householder. It includes people temporarily away for reasons such as visiting, traveling in connection with their jobs, attending school, in general hospitals, and in other temporary locations." (http://www.census.gov/hhes/www/housing/ahs/ahs99/appendixa.pdf).

Households Containing bryon brewer					Add this client to Household
Household Type	Clients in Household	Relationship	Start Date	End Date	Head of Household
Male Single Parent	4	Father	01/01/2002	01/01/2002	No

Only enter the members of a client's household if those members are homeless and are receiving services with the client.

Create New Household

1. Click "Add This Client to Household" from the bottom of the Client Profile screen.
2. Complete the following fields
   - **Household Type**
   - **Head of Household?**
   - **Relationship to household members** - This field is to help you understand the basic structure of the household. Don't worry about getting the exact relationship structure of a "family tree". You are simply keeping track of where individuals fit in the household. If a woman and her child form a single parent family you would obviously say the woman's relationship was Mother and the child was Son. However, if four generations of a family are living together, you might indicate the client as the Head of Household and base the relationships from the homeowner.
   - **Date entered relationship**
   - **Date ended relationship** - this field is not required.

Add Client to Household - (bryon brewer)	
Household Type (if starting new household)	-Select-
Head of Household	-Select-
Relationship to Household members:	-Select-
Date Entered Relationship	(mm/dd/yyyy)
Date Ended Relationship	(mm/dd/yyyy)
Start NEW Household	Add to EXISTING Household	Cancel

3. Click "Start NEW Household." The household will be created and your client added to the household.

To continue adding more household members

You may do so by entering the client information in the Household pop-up window and click "Add / Find Client" The system will allow you to create a new client record or use an existing client record and add that person to the household.

Add Client to Existing Household

1. Click "Add This Client to Household" from the Client Profile screen.
2. Click "Add to EXISTING Household" from the household pop-up window.
3. To find the existing household record, enter the name of another client that is part of the same household.
4. All matching households will be displayed. To add your client to a household, click on the "Add" button. *Note:* You can click the magnifying glass icon to view all the members of a household.
5. After you click "Add", enter the following details to complete:
    - **Head of Household**
    - **Relationship to household members**
    - **Date entered Relationship**
    - **Date Ended Relationship**

> ***Special Note -*** *All Household members should be created before entering clients into a program. Although WISP 3.X will work fine without households, using one will create associations that make it faster and easier for you to record data in WISP. By tying their records together, you can perform one action to update or provide services to an entire household. If you do not use households, you will find yourself performing duplicate entries for each member of the household receiving services and may even forget to make required entries for all members of a household. Households allow your agency to produce reports specific to family composition, trends in living arrangements, and needs most commonly found among specific groups.*

Program Entry / Exit

The entry/exit button is the first in a series of four brown buttons at the top right of the ClientPoint screen. The entry / exit function gives you the ability to record the dates a client enters and exits a program or service you offer. It is important that you accurately record entry and exit dates for all clients entering a program if you wish to retrieve accurate reports.

To ENTER a Client into a Program
1. Click on the brown "Entry/Exit" button from the ClientPoint Profile screen.
2. If this client belongs to a household, you may select any or all of the other household members that are also entering the program.
3. Under Entry Data, select the Program from the dropdown list.
4. Select the Type - the "**Type" of program is important for HUD funded programs**. Select the type based on the program:

Program	Type
• Transitional Housing	Basic Entry / Exit
• Supportive Housing Program	HUD 40118
• Permanent Supported Housing	HUD 40118
• Rental Assistance	Standard Entry
• Motel Voucher	Standard Entry
• Food Pantry	Standard Entry
• Safe Haven	HUD 40118 (*if SHP funded*)/ Basic Entry/Exit(*if not SHP funded*)

5. Enter the entry date and time.
6. Click "Save Entry/Exit"
7. If you don't enter a household member into the program, you may do so later by opening the Entry/Exit screen and clicking the Edit Icon (pencil). Then just select the household member and click "Add Related Entry/Exit".

To EXIT a Client from a Program
1. Click on the brown "Entry/Exit" button from the ClientPoint screen.
2. All the programs the client is currently in will be listed. Click the pencil next to the appropriate program(s) .
3. Under Exit Date, enter the following information:
   • Exit Date and Time
   • Reason for Leaving
   • Destination
   • Any other notes
4. If this client belongs to a household, you may select any or all of the other household members that are also exiting the program.
5. Click "Save Entry/Exit"

Release of Information

A Release of Information (ROI) is a form a client must sign to give permission for personal data to be shared with other WISP agencies. For minors, a parent or guardian must give permission for their child's data to be shared.

Enter a Release of Information
1. Click the orange ROI button from the ClientPoint profile screen.
2. Click "Add Release" from the ROI window.
3. If the release covers other household members, check any or all of the household members.
4. Enter the following information
   - Provider -- choose the provider the client has given permission to share his data.
   - Release granted?
   - Start Date
   - End Date
   - Documentation (On File, Verbal, None)
   - Witness
5. Click "Save Release Info"

# Inputting Information and Keeping It Open in Your Agency

Regardless of whether a client wishes to share information with other WISP providers or not, *information about that client can still be entered into Wisconsin ServicePoint* and made available to staff in your agency's programs and subprograms. *Client information can only be shared outside your agency with a signed Release of Information (ROI).*

If a client refuses to share information and sign the ROI ,. *See Securing Record*. You must secure the client's record so that at a minimum it stays only open within your agency.

- To close a client's record so that even the name will not appear to other agencies, click the padlock on the brown bar and select "CLOSED".

- To close an assessment (*the name of the client will appear in a search but no information attached to the assessment that was closed will appear*), click on the padlock next to the name of the assessment that is to be closed.
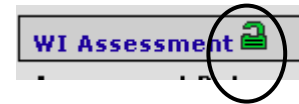
- To close an answer to an individual question.
  - ✓ Enter the answer to the question,
  - ✓ Save the assessment,
  - ✓ Click "H" at the end of the question, and
  - ✓ Click on the padlock next to the answer in sub screen.

	Date	User	Provider	Value		
🗑	11/06/2003	Tanya Wagner	WI Department of Commerce (Level 1)	Yes	🔒	

For any of the options above, once you click on any of the open (green) padlocks you can close security and if you click on a red padlock you can open security. At this point you can either close the whole item to everyone or select from your default list those agencies for which the information is to be made available. This list is called the default exceptions list and your agency administrator sets it up.

Case Worker Assignment

Enter information about each case manager assigned to this client under this screen. It is important to record contact information about case managers for other providers who share this client file -- it will help you coordinate services and facilitate better communication among case managers.

Adding a Case Manager

1. Select "Case Manager" from the ClientPoint Profile screen.
2. Select "Add Caseworker" from the Case Manager window.
3. Enter the following information
    - Provider -- select the provider the case manager is associated with
    - Name
    - Title
    - Phone Number
    - Email Address
    - Date Started - date case manager was assigned to client
    - Date Ended -- date case manager stopped working with client
4. Click "Add Caseworker" to complete.

If you wish to remove or edit a case manager record for this client, simply open the Case Manager window and click on the Edit Icon (pencil).

Anonymous Client Records

Anonymous client records can be created in ClientPoint. Anonymous client records may be needed by I&R agencies that receive anonymous callers, and by agencies that deal with victims of domestic violence whose safety may be in danger.

Anonymous records should be created only after careful consideration of your situation. An identifiable client record consists of first and last name, birth date, and sex. We highly recommend that agencies collect this basic information and then restrict assessment and service records (See Securing Your Data) if an agency wishes to keep client data confidential and private. Creating anonymous records without this basic demographic information may mean that your reports will not provide a true unduplicated count.

To create an anonymous record:
1. Click on the "ClientPoint" tab.
2. Complete as much demographic information as you have available, if any.
3. Click on "Add As Anonymous Client".
4. The client record has been created. A unique ID will be assigned to the client.
5. You may now enter service transactions, notes, case plans, etc. as usual.

If an agency uses the Anonymous Client feature that agency must keep a record of the unique anonymous IDs for each anonymous client so that anonymous clients are given only one ID. Agencies must use the ID number to find a client in ClientPoint and NOT create multiple anonymous records for the same client.

Assessments

Assessments provide detailed topic-specific information about your client in a questionnaire format. Assessments are a great way to not only provide statistical reporting about your clients, but also see how a client's situation has changed over time.
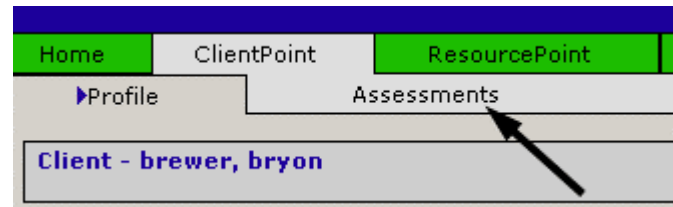
Assessments can be customized. Your agency has specific assessments it must fill out, but these vary based on the type of agency and program(s) offered. The Bureau of Housing has created a number of different custom assessments. Your agency administrator will select those assessments that are appropriate for your agency to use.

Navigation

Use the ClientPoint Assessment tab (gray tab at top of screen) to view the Assessment List your agency administrator decided to include in the "green box".   The assessments most agencies will use are as follows:

- **WI Assessment** which is a compilation of HUD and State required data elements and elements that the continuum collects under the direction of the Wisconsin ServicePoint steering committee. This assessment is either attached to the ClientProfile or will be found on the entry screen of Entry / Exit.

- **WI Medical Assessment**, includes medical questions from HUD and the continuum that must be closed because of HIPPA regulations.

- **WI Exit Assessment** is filled out in the exit part of Entry/Exit. This assessment catalogs a client's successful or unsuccessful program completion and where the client is going after leaving a program.

- **WI Additional Profile** is an assessment used to add or correct essential information about a client's birthday, race, ethnicity, and sex . It may also be used to collect additional demographic information your agency may be interested in even though HUD and the State are not interested in the same information.

> Food pantries, central points of intakes or call-ins, domestic violence shelters, and Wisconsin Department of Veterans will each have unique custom made assessments. Please work with the system administrators if you have any specific questions about these assessments.

The use of all non-required assessments will be at the discretion of the agency administrator and your agency.

Backdate Mode

At times, it may be necessary for you to enter an assessment and date the assessment with a date in the past. For example, your agency may use paper

questionnaires and choose to enter assessment information into Wisconsin ServicePoint at the end of the week. In these situations, you'll want to use the Backdate mode. To use Backdate:

1. At the top of the assessment screen, enter the date you wish to use for this assessment.
2. Click the "Use Date" button.
3. The screen will refresh and display yellow bars at the top and bottom of the assessment. This reminds you that you are in Backdate mode.
4. Enter the assessment. When you are done, be sure to click "Return to Live Mode" in the yellow bar.

Previous Answers / Historical Data

As you update information on an assessment or change the answer to a question, a record of the previous answer is always stored. This will allow you to report on historical data and give you a picture of how the client's situation has changed over time. If historical data is available for a particular question, an "H" will appear next to the answer. Click the "H" to see a history of previous answers to that question.


History
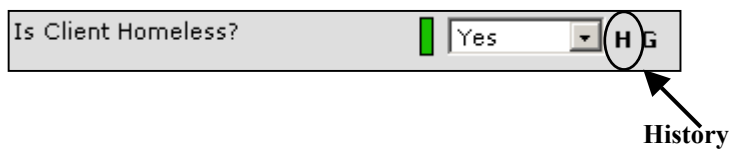
Case Plans

The Wisconsin ServicePoint Case Plan tool gives you the ability to set measurable goals and objectives for your clients and capture outcomes. Case Managers will find this tool helpful in creating and following up to insure their clients are accomplishing each action step in the plan to ultimately achieve the set goals.

Creating A Goal

1. Pull up the client record in ClientPoint for which you wish to create a goal.
2. From the ClientPoint Profile screen, select "Case Plans"
3. Click on "Add Goal"
4. Household Members -- If you are creating a goal that applies to other household members, click on the checkbox for each member you wish to associate with this goal. The system will create goals under that client record as well.
5. Goal Data - enter the following:
   - Provider -- the program with which to associate this goal
   - Date Goal Set
   - Goal -- The first picklist that allows you to select a classification for the goal. The second picklist allows you to select the actual goal.
   - Target Date - goal should be achieved by this date
   - Overall Status
   - If Closed, Outcome - be sure to enter a date here as well.
   - Follow-up - These fields will help remind you when to follow-up on this goal
     - ✓ Projected Follow-up Date
     - ✓ Actual Follow-up Date
     - ✓ Follow-up Made
     - ✓ Outcome at Follow-up
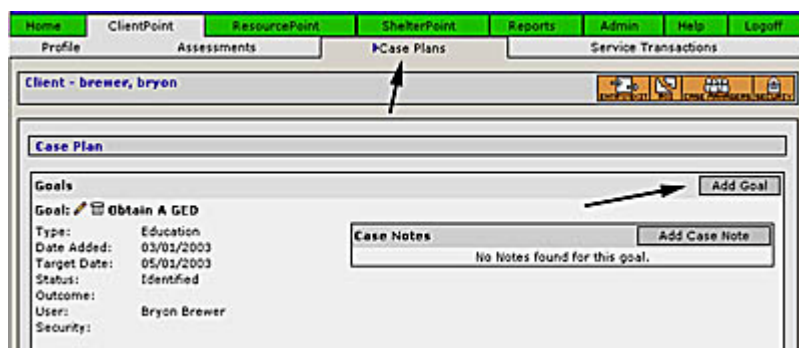
Click "Save Changes" - This will submit the page, add the goal, and give you the opportunity to add additional information to the goal.

You can pull reports based on follow-up dates to help you find goals on which you need to follow-up. You can return to the goal and enter actual follow-up dates and the outcome of the follow-up.

Adding Case Notes

Case Notes can be accessed from the front page of the Case Plan section, or when you are editing a goal. To create a case note, simply click "Add Case Note." In the case notes popup window, select the program

and date and enter your notes. When you are done, click "Add Note." You may add as many notes as you wish. Each case note can be up to 4,000 characters in length.

Adding Action Steps

Action Steps are individual actions that will be taken to help reach a goal. Action Steps are a great way to insure that progress is being made on a goal and they help remind you to follow-up on the goal with your client.

To Create an Action Step

1. Click on the Edit Icon (pencil) next to the goal to which you wish to add an Action Step to.
2. Scroll to the bottom of the edit screen, and click on "Add Action Step."
3. If you wish to setup this Action Step for other household members, click on the checkbox next to each household name
4. Enter the following data:
   - Program associated with the Action Step
   - Date Action Step was set
   - A description of the action to be taken or that needs to be taken
   - Target date to achieve this action
   - Overall Status
   - If Closed, Outcome -- be sure to enter date
   - Follow-up
     - ✓ Projected follow-up date
     - ✓ Actual Follow-up Date
     - ✓ Follow-up Made?
   - ✓ Outcome
5. Click "Add Action Step"

Adding Needs/Services

Typically, certain needs will exist with which the client requires assistance to achieve the set goal. Wisconsin ServicePoint gives you the ability to enter these needs and what services have been provided by your agency or other agencies related to the achievement of this goal.

To associate needs/services provided with a goal, click on the Edit Icon (pencil) next to the goal and then click "Add Need/Service". See Service Transactions for help with entering needs / services.

Edit/Delete A Goal

The case plan screen will show all goals entered for the client. To edit a goal, click on the Edit Icon (pencil) next to the appropriate goal. To delete a goal, click on the Delete Icon (trash can).
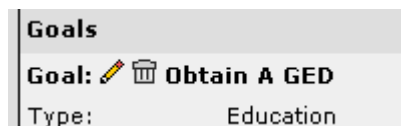
Service Transactions

The Service Transactions section of ClientPoint gives you the ability to identify client needs, provide services, or make referrals to agencies that can provide services needed. Service Transactions also creates a record of the services provided to the client. Service Transactions are vital to providing a complete and accurate picture of clients needs and the services provided to them. These service transactions can help you identify trends, service gaps in your community, counts of needs, and more.

Identifying a Need for a Service, a Referral, or a Gap

- Pull up the client record in ClientPoint.

- Click on the Service Transactions gray tab from the ClientPoint profile screen.

- When you enter the Service Transaction section, WISP automatically brings you to the Add a New Need/Service screen.

- If this need/service should be associated with other household members, click on the checkbox next to each household name.

- Enter the following information for the need.
  1. Provider (the agency or program that discovered or is entering the need)
  2. Date service started or was provided
  3. Type of Need/Diagnosis
     - ✓ If a "Quicklist" is developed for the most commonly used terms of need, the user may select from the quicklist by clicking on the down arrow to show the list.
     - ✓ If "Lookup" is used, follow the steps below.
        1. Click on "Lookup"
        2. Click on the down arrow in the Code Set select field and choose the AIRS Taxonomy code set.. Or, enter a search term in the search box to locate the appropriate code.

> **Note:** *The code available for indicating a need in WISP is the AIRS Taxonomy of Human Services*

   3. Click on one of the terms shown or one of the arrows next to a term to find the term that best identifies the need or diagnosis. The appropriate code will automatically fill in. As an alternative you can enter a descriptive term of the need in the search box and then select the best choice in the choices shown below.

> *Note:* *If you use the Lookup button, we suggest that you page-down through the needs list and select the best term possible. This will provide better reporting data. If the need selected is to be used for making a referral, the top three or four levels may offer the best search results.*

4. If Need is Financial, enter amount
5. Fill out -. *Overall Need Status* and *Overall Outcome*.

| Overall Need Status | -Select- |
| Overall Outcome | -Select- |

Action	**Overall Need Status**	**Overall Outcome**
Incomplete Service	Closed	Not Met
Completed Service	Closed	Fully Met
Referral	Identified	Full Met
Gap	Closed	Not Met

6. If "Incomplete Service," or "Gap" then fill out *If Not Met, Reason* using the following table.

Action	If Not Met, Reason
Don't have enough money to meet everyone's need or a program is at capacity with a wait list.	All Services "Full"
Eligibility requirements make certain potential clients not eligible for a service.	Client Not Eligible
Agency can offer the service and so a need is identified with a plan to provide the service but	Client Refused Service
No agency in the local continuum provides the service.	Service Does Not Exist
Because of disablitity or transportation issues a client cannot access an otherwise available service.	Service Not Accessible

7. If more explanation about the need is requried, fill out "Notes about Need" (optional)

- Click Save Changes.

Entering Services Provided

The agency/program providing services for an identified need should record the information.

- Enter a new service as described above in "Add a Service/Need" or update a Service Transaction previously entered by clicking "View Past Needs/Services."

- If updating, click on the Edit Icon (pencil) next to the Need.

- Scroll down and click on "Add Service."

1. If a "Quicklist" is developed for the most commonly used terms of need, the user may select from the quicklist by clicking on the service.
2. The Service Provided code available that is used in WISP is the AIRS Taxonomy of Human Serives. Click on the arrow in the select code field and choose the code set for this service thus changing the picklist in the search field to that code set.
3. Select the desired term.

- In the popup service window, click on the checkbox next to each household member who received this service.

- Enter the following information for services provided.
   1. Who Provided the service
   2. Date service started or what provided
   3. Date service ended
   4. Provider-specific Service
   5. Cost of Service 1
   6. Cost of Service 2 (this allows you to enter a second source of funds if the service cost was funded by two sources)
   7. Follow-up (follow-up information if needed)

- Click Save & Exit.

Enter Referrals/Make a Referral

If your agency is unable to meet the needs of a client, you can refer the client to another agency that might be able to help. To enter a referral, follow the steps below.

- Enter a Need or use the update function to access a Service Transaction by clicking "View Past Needs/Services."

- If in the update mode, click on the Edit Icon (pencil) next to the Need.

- Scroll down and click on Add Referral.

- In the popup referral window, place a checkbox next to each household member who you are also referring.

- For non-shelter referrals, enter the following information.
   1. Referral Date
   2. Provider (Select the provider from the dropdown list. If not listed, click on Lookup to search through the Resources database. See ResourcePoint for more information.)
   3. You may refer the client to up to five different providers for one need
   4. Click on Save Referrals when finished

- For shelter referrals, enter the following information.
   1. Referral Date
   2. Provider (select the provider from the "bed avail" list)
      ✓ click on "bed avail"
      ✓ the screen displays a list of provider shelters with attached bedlists that indicate type or section of shelter, how many beds in the list, how many beds used, how many beds available, how many overflow beds presently used and the percent of capacity
      ✓ the "no" icon shows shelters with no vacancy
      ✓ select the shelter you to which you wish to refer your client by clicking on the provider name
      ✓ click "Save Referrals" when finished

3. You may refer the client to up to five different shelter providers
4. Click on "Save Referrals" when finished.
5. You should notify the agency that you are referring a client to them.

Canceled Referrals

Canceled Referrals are referrals that the receiving agency was unable to handle or solve for the client. If your agency receives a referral, and either the need was met by someone else, or you are unable to meet the need, you should cancel the referral. To cancel a referral, follow these steps.

- From the Service Transaction screen, click View Past Needs/Services.

- Click on the Edit Icon (pencil) next to the Need.

- Scroll down and click on Cancel Referral next to the referral made to your agency.

- In the popup window, select the reason you are canceling the referral from the dropdown list.

- If you wish to cancel the referral for other household members, click the checkbox next to each name.

- Click Save Referral Info.

The canceled referral will now appear under the Canceled Referrals section when you view that need.

Receiving Referrals

The designated staff member in your agency will receive an e-mail alerting him/her to the existence of a referral. The "Outstanding Referrals Report" is run and the following steps are taken.

- retrieve the records for the client named in the e-mail

- go to "Service Transactions" and click "View Past Needs/Services"

- click on the pencil (edit icon) next to the referral that matches the need type reflected in the "Outstanding Referrals Report"

- scroll down to "Outstanding Referrals"

- if you cannot provide the requested service, click "canceled referral" and on the next screen give the reason you are unable to provide the service

- if you are able to provide the service, click the pencil icon and enter the service dates and any additional information that you can

- click "Save Service" when you are finished

View or Edit Past Needs/Services

By default, ClientPoint automatically enters Add mode when you click on Service Transactions. If you wish to view past needs or services, click the button View Past Needs/Services.
This will give you a list of all past transactions. To view or edit any of them, click on the Edit Icon (pencil) next to the transaction in which you are interested.

RESOURCEPOINT

Wisconsin ServicePoint's ResourcePoint module provides a comprehensive database of area agencies and programs. ResourcePoint can help you locate agencies and programs that offer services your client may need.

Finding Resources

Wisconsin ServicePoint's (WISP) ResourcePoint module provides a comprehensive database of housing and homeless service agencies and programs in Wisconsin. When you need to make a referral, ResourcePoint can help you locate agencies and programs that offer the services your client may need.

The same list of housing and homeless service agencies and programs that is used by WISP partner agencies is also used in Front Door, the web-based program open to the general public. This is the only module available to the general public in WISP. ResourcePoint information is entered into the database in the agency and/or program profile pages found in WISP. For consistancy and accuracy reasons a Style Guide is used when entering data and informaiton.

Searching the Resource Database

- **Basic Search**

  The basic search allows you to find resources by keyword, type, and location. Simply enter your search criteria and click "Search." The available search options follow.

  1. Alphabet
  2. Keyword/Search Term (will search the provider name, complete description, and zips served)
  3. Location: (City/State/County/Area/ZIP)
  4. Type: (the type or organization, i.e., agency/program as defined by your system administrator)
  5. Wisconsin ServicePoint User: (if checked, shows only agencies that are using Wisconsin ServicePoint to track client data

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- **AIRS Taxonomy Search**

AIRS Taxonomy is a classification system. If your administrator has classified all your area resources, you can search by simply pointing and clicking on the categories related to the types of needs your client has. To search by category follow these steps.
1. You can type a keyword to find specific categories
2. You may also click on the down arrows to page down through the category lists. As you page down, the categories become more specific.
3. Once you find the category of interest to you, click on the category name to search the database. The further you page down, the more specific your search will be. If you are not getting results, try to move one level up in the taxonomy.

Viewing Agency/Program Data

After clicking on the "Search" button from the ResourcePoint search page, you will get a list of matching results. Click on the name of the agency/program to view a data profile of the resource. Some of the information available includes:

- ✓ Hours of Operation
- ✓ Contact information
- ✓ A map (Maps provided by Yahoo.com. Driving directions are available from this page as well.)
- ✓ Eligibility
- ✓ Description
- ✓ Fees
- ✓ More...

SHELTERPOINT

The ShelterPoint module of WISP is both a centralized shelter management system and an information resource. It provides users with the ability to check bed availability, refer a client, and reserve a bed. Shelters can manage their bed lists, and check-in and checkout clients .

Using ShelterPoint

Selecting a Provider/Shelter

- Select a shelter from the Provider picklist.   All emergency or transitional shelters in Wisconsin should be shown here.

Selecting a Bedlist

- After you have selected a shelter, select the bedlist in which you are interested. A bedlist is nothing more than a collection of beds. They are used to group beds by section, location, or eligibility (for example, a Men's bedlist and a Woman's bedlist).

Reserving a Bed Click "Add Reservation."

- Enter information about the client for whom you wish to reserve the bed.

- Click "Continue with Reservation."

- A display appears if an exiting client record matches the name or social security number of your client. Click on the existing record, or click "Add Client With This Information" to create a new record.

- Enter the date the client wishes to stay at the shelter. This is the reservation date.

- If other household members will be entering the shelter as well, click the checkbox next to each household member.

- Click on "Save & Continue."

If you wish to cancel a reservation, click the "cancel reservation" link located next to the client name. Please note that this only places the client into the reservation list. It does not actually confirm or guarantee a bed for your client. The shelter will make the final determination based on availability and eligibility.

Bedlist Management (for shelters)

Checking In a Client

- To check-in a client, simply click on the word "EMPTY" next to the bed that you wish to assign the client. If no beds are available, you may click "EMPTY" on the Overflow line.

- Enter the client information (name, birth date, social security #, gender, race, and ethnicity).

- Click "Continue with Check In."

- A display appears if an existing client record matches the name or social security number of your client. Click on the existing record, or click "Add Client With This Information" to create a new client record.

- Enter the Date In, if given any supplies, a locker # assigned, or any notes written.

- If any household members are also entering the shelter, place a checkbox next to each name and assign them a bed. If you do not assign them a bed, they will automatically receive an overflow bed.

- A Print button is available if you wish to print this information for the client.

- Click on "Save and Continue."

Checking Out Clients

There are two ways to check out clients. Either you may use the Transmit List, or you can check each client out individually.

To use the Transmit List

- Click "Transmit Today's Checkout List." a bar at the bottom right of the screen.

- Click the checkbox next to each client who is leaving the shelter.

- For each client, enter the date and time out and indicate the return of supplies as well.

- You may use the TP "Checkout Date" to set the checkout date for all clients listed on the form. To do so, click "Set Dates" to set all clients to the same date and time.

- Click "Check Out."

To check-out individual clients one at a time

- Click on the client name.

- Enter the date/time the client left.

- Indicate the return of supplies, or not.

- Enter the cost of services if any.

- Click on "Save."

> NOTE: The Transmit list does not support cost of service entry. You must enter cost of service entry prior to using the Transmit List if you choose to checkout clients using the Transmit List.

Confirmations

The confirmation list allows you to confirm clients who you know will be staying at the shelter that night. After you confirm each client you know is staying that night, you may have a number of clients checked into the shelter but not confirmed. These clients never returned for the next night's stay, thus, those clients can be checked out using the transmit list. The confirmation list provides you an easy way to identify those clients that need to check out.

To confirm an individual client

- Click the client name to confirm.

- Select "Yes" next to the Confirmed for Next Day Stay question.

- Click on "Save."

To confirm a list of clients using the confirmation list

- Click "Update Confirmation List."

- Click the checkbox next to each client you wish to confirm for the night.

- Click on "Save."

Bedlist *(Bowman Bedlist #1 - Emergency Shelter)*

Display [All Beds ▼]   Sort By [Bed ▼] [Ascending ▼] [Filter]

Beds - *15*   Used - *14*   Available - *1*   Overflow - *8*   Capacity - *93%*

Floor	Room	Bed	Client	DOB	Gender	Race	Household ID	Confirmed
First	100	0001	Landers, Mike				117	No
First	101	0001	Adems, Vince P	5/3/1935	Male	American Indian (HUD 40118)	156	No
First	100	0002	Smith, Dan	10/13/1972	Male	Asian & White		No
First	101	0002	test, fred	6/25/1975	Male	Other Multi-Racial	172	No
First	101	0003	Test, Paul K	2/19/1934	Male			No
First	101	0004	Avons, Tim	1/1/1900			77	No
First	101	0005	EMPTY					
Second	200	0006	Adams, Mike		Male	White (HUD 40118)		No
Second	201	0007	Jackson, Barbara		Female		156	No
Second	201	0008	Landers, Tim				117	No
Second	201	0009	Tester, Gloria J	8/14/1952	Female			No
Second	201	0010	Tester, Billy		Male			No
GYM	Gym	0011	Kirks, Tim					No
GYM	Gym	0012	Tester, John D	2/28/1975	Female	American Indian (HUD 40118)		No
GYM	Gym	0013	Henderson, Bob J	4/17/1972	Male	Asian & White		No
		Back Hallway	Test, Harold		Female			No
		foyer table	Aalan, Bob T	1/1/1900	Male	Black (HUD 40118)		No
		front hallway	thomas, frank	2/15/1972	Male			No
		hallway chair	Flandersons, Timothy A		Male			No
		testbed	Avons, Mary		Female		77	No
		Overflow	Test, Paul K	2/19/1934	Male			No
		Overflow	Ellis, Margoo		Female			No
		Overflow	Smith, Franklin		Male			No
		Overflow (new)	EMPTY					

[Update Confirmation List]   [Transmit Today's Checkout List]

SECURING YOUR DATA

The security and confidentiality of your data is very important and taken very seriously by the Bureau of Housing (BOH) within the Wisconsin ServicePoint(WISP) application. WISP gives you complete control over who can access your client data and what they can access.

About Security

It is important that all users guard their user IDs and passwords and follow the security and data sharing procedures set forth by your administrator. Failure to protect confidential data could result in termination of your job as well as legal action against you.

All or a portion of records can be open or closed within WISP. If a record or a portion of a record is closed, only your provider and sub-providers can see the data unless you have opened the record to specific agencies (exceptions).

Wisconsin ServicePoint 3.X Security Diagram
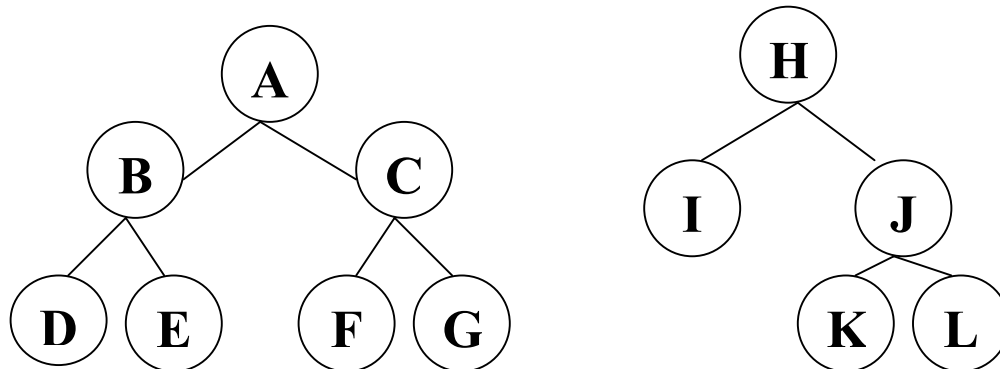
The diagram above represents two different organizational structures created in WISP. "A" represents a level 1 provider and its child providers are "B" and "C." Then level 2 provider "B" has child providers "D" and "E" as level 3 providers, and level 2 provider "c" has child providers "F" and "G". In the second structure, "H" is a level 1 with "I" and "J" as level 2's. "J" has two level 3's "K" and "L".

The table below demonstrates what access rights a provider will have as restrictions are set either by default or as a User enters data into WISP. Note that the viewing privileges will also depend on what User Access Level is given to a person using WISP.

Restricted By	Closed Exceptions*	Has Access
A	----	ABCDEFG
B	----	BDE
D	----	D
C	----	CFG
F	----	F
A	J	ABCDEFGJ
B	HK	BDEHK

Restricted By	Open Exceptions**	Has Access
----	----	ABCDEFGHIJKL
----	C	ABDEHIJKL
----	H	ABCDEFG
----	CJ	ABDEHI

*Providers ALLOWED to access closed records
**Providers NOT ALLOWED to access open records

Icons

1. **Open-**   This record is open to all users

2. **Open with Exceptions-**   This record is open to all except the designated agencies

3. **Closed-**   This record is closed to everyone but your provider and sub-providers

4. **Closed with Exceptions-** This record is closed to everyone but the provider and sub-providers, and the designated list of exceptions

Release of information

Every client you enter into Wisconsin ServicePoint should have a release of information on file if you wish to share the client's record with other agencies or programs. A Release of Information is a dated document that will expire.

Default Security Options

Each provider may specify default security options when creating client records. To setup your defaults, see the Administration section.

Securing Records

Many pieces of data make up a client record. To give you the most flexibility, Wisconsin ServicePoint (WISP) allows you to secure an entire client record or only portions of it. Security default settings are set by the Agency Administrator when your agency and its programs are entered into the system through the Administration profile screen.

 Depending on the client, you may choose to change the default settings. Certain files or fields may be closed or opened to specific Providers. For example, you may leave a client record open and available to other agencies except for the mental health assessment. The security settings you make in a file will override the default settings.

Securing the Entire Client Record

- The entire record is closed. The client will be invisible to all other providers. Other users when searching or reporting in WISP will not find the client record. To secure a client record, first go to the Client Profile section of a client record.

- On the profile screen, click the brown "Security" button at the top right of the screen.

- Click the link on the security window to open or close the record.
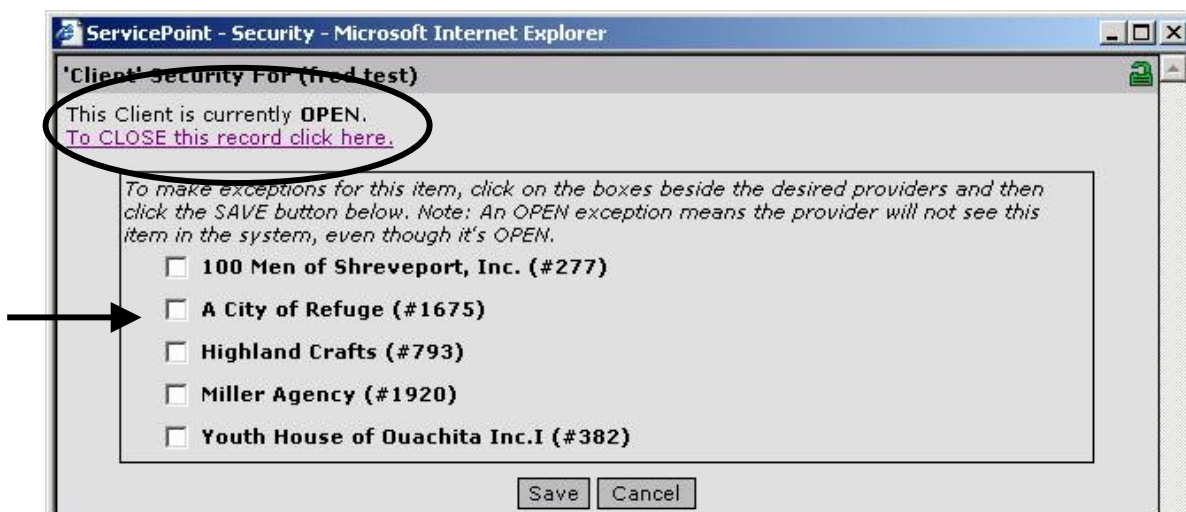
- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure caseworker records

- To secure the caseworker record, go to the Client Profile section of the client record.

- On the profile screen, click the brown "Case Worker" button at the top right of the screen.

- Click the Edit Icon next to the caseworker record you wish to secure.

- Click the security lock.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.
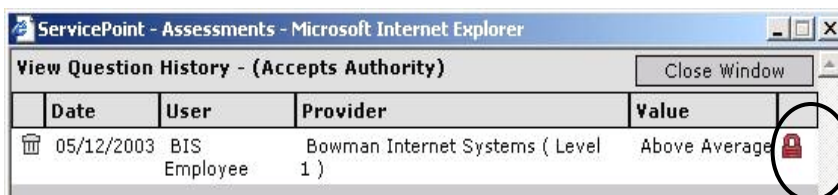
- Click "Save."

Securing assessments

- At the top of each assessment, you will see a lock. Click the lock to open the security settings for that assessment.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure an individual question or question history

- Each assessment question stores every previous answer to that question. If you decide to leave the assessment record open, but wish to secure certain historical data, you may do so. From the assessment screen, click on the History Icon **H** next to the question you wish to secure.

- Click the Lock Icon next to the item you wish to secure.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure sub-assessments

- You can secure each line item in a sub-assessment. Click the Lock Icon next to the line item you wish to secure.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure goals/case plans

- You can secure an entire goal as well as the individual parts of the goal. To secure the entire goal, click on the Edit Icon next to the goal you wish to secure.

- Click the Lock Icon next to the item you wish to secure.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure case notes

- To secure a case note, click on the Edit Icon next to the note you wish to secure.

- Click the Lock Icon.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Secure action steps

- To secure an action step, click on the Edit Icon next to the step you wish to secure.

- Click the Lock Icon.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

Securing service records

- You can secure each service record. To secure a service record, click on the Edit Icon next to the service item you wish to secure.

- Click the Lock Icon.

- Click the Open/Close link to open or close the record.

- If you wish to make an exception to this setting for another agency(s), click the checkbox next to the agency's name.

- Click "Save."

> **Note:** *You cannot change the security settings of a record during creation (except Assessments). You must first create the record, then go back, and edit the record to change security settings. In Assessments, you can change the security settings after entering an answer. Click on "View History" for a question and you can change the security settings.*

Agency
Administration
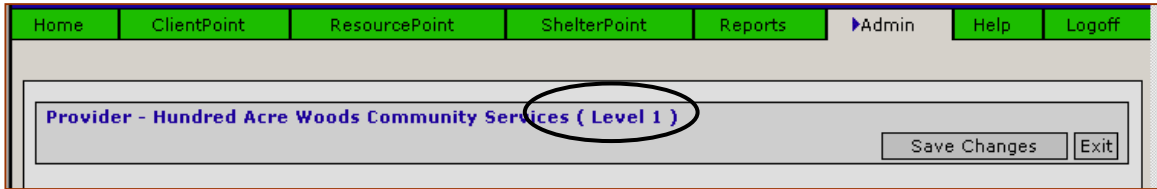
Your agency and its programs and projects make up the provider database in ResourcePoint. A provider profile must be setup for each organization using Wisconsin ServicePoint (WISP). This profile is used by other WISP partner agencies for service transaction referrals, managing shelter beds, and for searching in ResourcePoint.

Adding/Modifying Programs
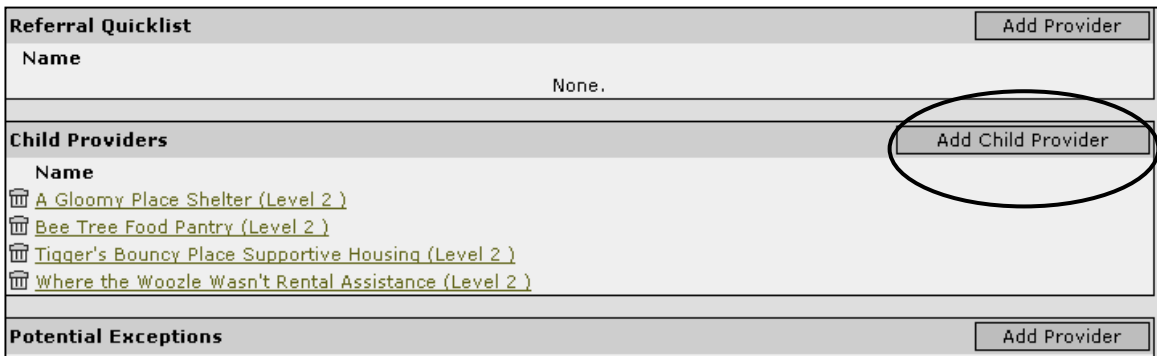
To Add a Provider

- Select your Level 1- the entity highest in your hierarchy and usually your agency name.

❶ Create the Agency Hierarchy

- From your Level 1, create your Level 2's.

  ✓ Go to **Child Providers** and select **Add Child Providers**

> **NOTE:** The highest level of any entity/Provider is the 'parent.' Just as in a family tree, any descendant of a parent is a child; any level of an entity/Provider that is below the highest level is a 'child provider.' Remembering the image of a family tree, you can see that there may be many levels of child providers. For example, parent, children, grandchildren equate to administrative office, programs, various sites for each program.
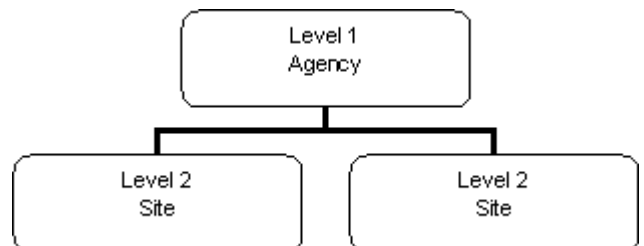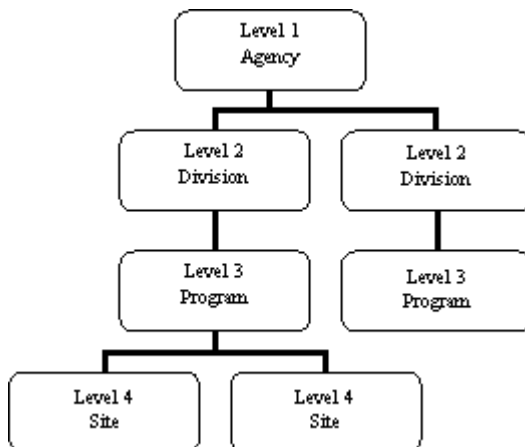
✓ Now in Level 2, fill out **Name** of program.

✓ Affirm that the program has the right parent entity.

✓ Scroll to the end of the page to the question "*Uses ServicePoint*" and select YES.

✓ Save Changes

- Continue creating Level 2 programs and subprograms. (Answer specific questions about each question only after the hierarchy has been established.)

- To create Level 3 or 4 programs or subprograms, Click "Admin Providers" from the Administration screen. This should bring up your agency and its programs.

- Select the program or subprogram that will be the parent of the subsequent programs.

- Follow the same steps for creating Level 2 programs to complete the process

> **Important Reminder:** Level 2's can only be created from Level 1, Level 3's can only be created from Level 2's and so on and so forth.

Important Considerations in setting up the HIERARCHY:

✍ **The following projects or programs *absolutely need to be tracked in Wisconsin ServicePoint*. These are MANDATORY.**

1) **Programs that receive <u>supportive housing funds</u> through the Continuum of Care (COC) to provide housing and/or services to homeless people. These are programs that must complete a HUD APR.**

2) **Programs that receive transitional housing funds <u>(THP)</u> where clients are provided with housing and services for an extended period of time (up to 24 months)**

3) **Programs that receive <u>State Shelter Subsidy Grant</u> funds and/or Emergency Shelter Grant <u>(ESG)</u> funds to provide shelter and/or services.**

These programs include the following <u>TYPES</u>:

<u>Emergency Shelter</u>: Facility-based or scattered site units that provide temporary shelter for homeless households. Guests may receive services to support their movement into transitional or permanent housing. Guests may have separate living quarters (room or apartment) or may have a congregate living situation such as dormitory-style.

<u>Transitional Shelter</u>: Facility-based or scattered site units that provide a short-term period of transition from homelessness to transitional or permanent housing. Supportive services such as case management, housing counseling, money management, transportation, etc. may be provided. Guests may often stay in transitional shelter 6+ months before moving to transitional or permanent housing.

<u>Safe Haven</u>: A form of supportive housing that serves hard-to-reach persons with severe mental illness who are on the street and have been unwilling to participate in housing or supportive services. Safe Havens are a refuge for people who are homeless and have a serious mental illness.

<u>Transitional Housing</u>: A program that provides supportive services to homeless households (singles or multi-member) for an extended period of time to enable the household to transition from homeless to permanent housing. Services may include assistance with rent, case management, transportation, childcare, skills enhancement, etc. The program participants may live in housing owned by the service provider or in leased units. Participants may have their own housing unit or may have individual bedrooms with shared facilities such as kitchen, bath, living room, etc. Participants do not live in dormitory-style housing. The period of enrollment is usually 9-24 months, depending on each household's needs.

<u>Supportive Housing</u>: Similar to Transitional Housing above, except this program is funded through the Continuum of Care Supportive Housing Program (SHP).

<u>Permanent Supported Housing</u>: Shelter Plus Care (S+C) and Permanent Housing funded through the Continuum of Care Supportive Housing Program (SHP).

<u>Rental Assistance</u> (rent, security deposit): Short term rent assistance – usually 6 months or less and often only one month. Rental assistance provided to participants in Transitional or Supportive Housing <u>should not</u> be entered as part of a Rental Assistance program **unless** it is to assist the participant move into <u>permanent</u> housing.

<u>Motel Voucher</u>: Payment for motel lodging for a homeless individual or household for a short duration. Vouchers can be for one night or multiple nights.

✍ **The following projects or programs are examples of other (NOT MANDATORY) projects or programs that some agencies track in Wisconsin ServicePoint This list is not inclusive. WI ServicePoint can track a myriad of program types.**

- ♦ **Food Pantries**
- ♦ **Central Points of Intake**
- ♦ **Case Management**
- ♦ **Counseling**
- ♦ **AODA Treatments**
- ♦ **Inkind Services like transportation and day-care**

❷   Fill-Out Information About Each Program

After all of your programs have been established, go back into each program to set-up the profile. Complete the following information:

1. ***Official Update***: The first box is for the date of update and the second box is for the name of the person updating. We recommend that you perform formal updates of the provider profile on a scheduled basis.

2. ***Name, Contacts, Location/Address:*** This information will appear in ResourcePoint and in the public interface, FrontDoor so make sure that this information is information for the public.

3. ***Telephones***: You may enter up to four numbers. Each number consists of a description (i.e., Main Phone, Hotline, etc.) and the actual number.

4. ***E-mail address and Website***: You should try to provide an e-mail address for all providers to use when notifying you of referrals.

5. **Provider *Type***

6. ***Show on Public Site***: Use this flag to show or hide your agency and/or program/project on the Front Door website.

7. ***Printed Directory***: A printed directory is a printed list of the provider database.
   If you do not wish to be included in the directory, flag this as "No".

8. ***Description and Landmarks***. Provide a brief description of your agency and/or program. Also, to make it easier to locate your agency and/or shelter list a nearby landmark such as a bank, school, etc.

9. ***Handicap Access***

10. ***Brochures****: Indicate if brochures about your agency and/or program services are available.

11. ***Zip codes* served**

12. ***ServicePoint Interface****: Indicate you are using ServicePoint here.

13. ***Default City/State/Country***: When you enter data, these pre-selected defaults will help speed data entry.

14. ***Program Fees,*** *Intake Procedures, Eligibility, Languages*

15. ***Is Provider a Shelter?*** If your agency and/or program is an Emergency or Transitional Shelter, indicate "Yes" for this question. With "Yes" selected your shelter will appear under ShelterPoint and in Referrals under the list of available beds.

16. ***Shelter Requirements***: Enter specific information regarding the requirements a client must meet to stay at the shelter. You are providing guidance here to someone who may be making referral.

17. ***Service Code***: Click the "Set" button to select the appropriate taxonomy code for your type of shelter. The code is simply a classification of the shelter using the AIRS taxonomy classification system. The code will appear automatically after you select the appropriate term that describes your agency/program.

Shelter Service Code		Set	Clear

For the purposes of being able to run continuum-wide or state-wide reports, the State recommends the following codes for the following programs.

SHELTERS
Domestic Violence Shelters	*"Battered Women's Shelter"*	BH-180.150-10
Runaway Youth Shelters	*"Runaway Shelter"*	BH-180.150-70
Other Emergeny/ Homeless Shelters	*"Emergency Shelter"*	BH-180

FINANCIAL ASSISTANCE
    Motel Vouchers   **"***Motel Vouchers***"**   BH-180.850-53
    Rental Assistance   "*Rent Assistance*"   BR-300.700
    Utility Assistance   "*Utility Assistance*"   BR-900

For all other types of financial assistance or if you have a voucher program that provides one or more of the above types of assistance select the following:

    Financial Vouchers/ Assistance   "*Temporary Financial Aid*"   BR

FOOD
    Food Pantry/Meals   "*Food*"   BD

TRANSITIONAL HOUSING / SHELTER + CARE
    Transitional Housing   **"***Postshelter Housing***"**   BH-180.900
    Shelter + Care   **"***Postshelter Housing***"**   BH-180.900

CASE MANAGEMENT
    Case Management   "*Case Management*"   PH-100

EDUCATION PROGRAMS
    Educational Programs   "*Educational Programs*"   HH

PERMANENT HOUSING
    Rental Housing   "*Subsidized Rental Housing*" BH-830
    Home Ownership   "*Subsidized Home Purchase*" BH-800

18. *Master Flag*: Set to "Yes" if your agency is responsible for administering the ServicePoint application.

19. *Uses ServicePoint*: If your agency will be accessing ServicePoint to track client data, select "Yes".

Click "Save Changes" at the bottom of the screen to complete the provider profile. The screen will refresh allowing you to enter additional provider information.

1. **Provider Specific Services**: When entering services you provide a client in Service Transactions, you must select the type of service provided. You can build a quicklist of services your agency provides here. This list will allow you to track the specific services you provide to clients.

2. **Areas Served**

3. **Bedlists:** A provider operating one or more shelters may multiple bedlists. See 'Setting up a Bed List' below. A bedlist is simply a list of the beds, by type, provided by the shelter, i.e., single women or single men. To setup a bedlist, see below. If you fail to establish your bedlist(s) here your intake workers will not be able to check a client into your shelter.

4. **Cities Served**

5. **Counties Served**

6. **Services Provided**: Add the type of services that your agency/program offers. In Wisconsin we use the AIRS Taxonomy codes. When a user is added to WISP AIRS Taxonomy is specified in the User screen.
   - Click on 'Add Services'
   - Using the AIRS Taxonomy selection screen, select the term(s) that describe your services
   - Be broad because these terms will be used for general searching in ResourcePoint and FrontDoor.

7. **Taxonomy Quicklist**: In need and referral areas of ServicePoint, you supply the taxonomy category that matches the service you are providing to a client. You may build a quicklist of common categories that you use to speed up data entry.

8. **Referral Quicklist**: When making referrals, you must indicate to which provider you are referring the client. If you commonly make many referrals to specific agencies, you may create a quicklist of those agencies to speed up data entry.

9. **Child Providers**: The highest level of any entity/Provider is the 'parent.' Just as in a family tree, any descendant of a parent is a child; any level of an entity/Provider that is below the highest level is a 'child provider.' Remembering the image of a family tree, you can see that there may be many levels of child providers. For example, parent, children, grandchildren equate to administrative office, programs, various sites for each program.

10. **Potential Exceptions:** You may choose to open or close your client records, or parts of your client records to others. And when you close sections, you may want to keep that information open to all the programs in your agency or a few other providers in your community with whom you have data sharing agreements. For agencies with more than one program or subprogram in their hierarchy, you may want to seriously consider setting up your list of potential exceptions so that you can still have agency-wide access to client information, even if that client does not sign an ROI. Use this section to create a list of potential exceptions. Then select the provider(s) to whom you may want to potentially open or close specific records.

    Adding an exception here does not automatically open or close client records to the provider you add.

    To make an exception automatically default so that it will always be opened or closed to a given program you must select add as an open/closed exception

    ✓ To keep information OPEN – 'Add as a Closed Exception'
    ✓ To keep information CLOSED – 'Add as an Open Exception'

    > **NOTE:** If the user deletes a Potential Exception after saving, that potential provider remains as a default exception <u>attached</u> to the Open or Closed tables.

11. **Default restrictions**: Indicate here how you want ServicePoint to handle security settings by default when you create new client records. Control each part of the client record here.

    > **NOTE:** Any assessment dealing with *Medical information* must be **'CLOSED'**.

12. **Assessment Administration**: Indicate here which assessments will be visible to your users, which is the assessment that is viewed first by default when using the navigation tab to enter 'Assessments,' which is connected to the Client Profile, and which is connected to 'Entry/Exit.'

    *   *Order*-change the order to view the list of assessments using the numbers in front of the assessments names
    *   *Visible*-check the box next to the assessment if you wish it to be viewed

- *Default*-click the radio button to select the assessment that is pre-selected for viewing first when entering the 'Assessment' mode **(WI Assessment)**
- *Show on Profile*-click the radio button to select the assessment to attach to the Client Profile for the Provider's users **(WI Additional Profile)**
- *Show on Entry*-click the radio button to select the assessment to attach to the Entry file for the Provider's users **(WI Assessment)**
- *Show on Exit*-click the radio button to select the assessment to attach to the Exit file for the Provider's users **(WI Exit Assessment)**

The following table will help guide the development of your user interface. In *Assessment Administration* where you set-up which assessment is viewed first by default when using the navigation tab to enter 'Assessments,' which is connected to the Client Profile, and which are connected to 'Entry/Exit.'

Assessment Administration

Order	Name	Visible	Default	Show On Profile	Show On Entry	Show On Exit
1	WI Assessment	☑	●	○	●	○
2	WI Medical Assessment	☑	○	○	○	○
3	WI Additional Profile	☑	○	●	○	○
4	WI Exit Assessment	☑	○	○	○	●
5	Childhood Immunization	☑	○	○	○	○
6	Children	☑	○	○	○	○
7	Client Budget and Expenses	☑	○	○	○	○
8	Custom System Fields	☑	○	○	○	○
9	Diagnosis	☑	○	○	○	○
10	Education	☑	○	○	○	○
11	Employment	☑	○	○	○	○
12	History	☑	○	○	○	○
13	Insurance Information	☑	○	○	○	○

For all programs the **Wisconsin Assessment**, the **Wisconsin Medical Assessment** and the **Wisconsin Additional Profile** must all be filled out and therefore should all be placed at the top of the Assessment page in Wisconsin ServicePoint.

SHELTER PROGRAMS:	Do not use the Entry/Exit.
ONE-TIME SERVICES:	Do not use the Exit portion of the Entry/Exit. *Entry/Exit type is Standard Entry*
LONGITUDINAL SERVICES	Use both the Entry and Exit of the Entry/Exit. *Entry/ Exit type is HUD 40118 or Basic Entry/Exit.*

- Click Save Changes to complete the provider record.

Setting up a Bedlist

A bedlist is simply a list of available beds within a shelter. Multiple bedlists can be set up. For example, you may have a bedlist for men and one for women.

- If you are not already on the Edit Provider screen, follow the steps below.
  1. Select Admin from the navigation bar
  2. Select Providers from the Administration screen
  3. Using the search form, locate the provider for which you want to add a bedlist and click on the provider name

- Click Add Bedlist.

- Enter the name of the Bedlist.

- Select the type of bedlist you are creating (this list can be edited by your System Administrator).

- Click Save Changes.

- You can now add Floor and Room information. Even if you have only one floor and one room, you must still create at least one floor record. Click on Add New Floor.

- Enter the Floor Name. If you have multiple floors to add, click Add Floor until you have entered all floors. If you do not want to name the floor, the System will show the default 'New Floor.'

- Click Add New Room.
  1. Enter the room name. If you have multiple rooms, click Add New Room until you have entered all rooms.

- Click 'Edit Beds.' You will need to do this for each room you setup.
  1. Enter the number of beds you have in that room and click Add New Beds
  2. A list of beds will appear. You can name or number each bed. When finished, click Save Changes. If you add under 100 beds, use 01, 02, etc. for one digit numbers. If you are planning to add 100 or more beds use 001, 002, 010, 011, etc. for one and two digit numbers respectively.

- Click on the bedlist name at the top to return to the list of rooms and enter additional beds.

Bedlist Data

Provider	Bowman Test Program (Level 2) (#543)
Name	Bowman Bedlist #1
Type	Emergency Shelter

Floor and Room Data   Add New Floor

🗑 **FLOOR:** First   Add New Room

   🗑 **ROOM:** 100   (2 beds) Edit Beds

   🗑 **ROOM:** 101   (5 beds) Edit Beds

🗑 **FLOOR:** GYM   Add New Room

   🗑 **ROOM:** Gym   (3 beds) Edit Beds

🗑 **FLOOR:** Second   Add New Room

   🗑 **ROOM:** 200   (1 beds) Edit Beds

   🗑 **ROOM:** 201   (4 beds) Edit Beds

🗑 **FLOOR:** Third   Add New Room

   🗑 **ROOM:** *New Room*   (0 beds) Edit Beds

NewsFlash

NewsFlash - System

- 'NewsFlash - System' is a means to post or edit news items that are of concern to your entire community. Only a System Administrator may access the System NewsFlash. By clicking on 'update news' on the Home page or going through the Admin module and selecting System News Administration, the System Administrator accesses a screen which gives the choices of adding news, editing news or updating the order of the news items. NewsFlash automatically jumps to the Admin mode from the Home page, so upon completion of an entry the System Administrator should click on the Admin tab to exit the NewsFlash screen.

NewsFlash - Agency

- 'NewsFlash - Agency' is a means for a System Administrator I, Agency Administrator or Executive Director to post and edit news items for his/her Provider only. No other Provider will see these items. By clicking on 'update news' on the Home page or going through the Admin module and selecting Agency News Administration, a screen is accessed which allows the choices of adding news, editing news or updating the order of the news items. NewsFlash automatically jumps to the Admin mode from the Home page, so upon completion of an entry, click on the Admin tab to exit the NewsFlash screen.
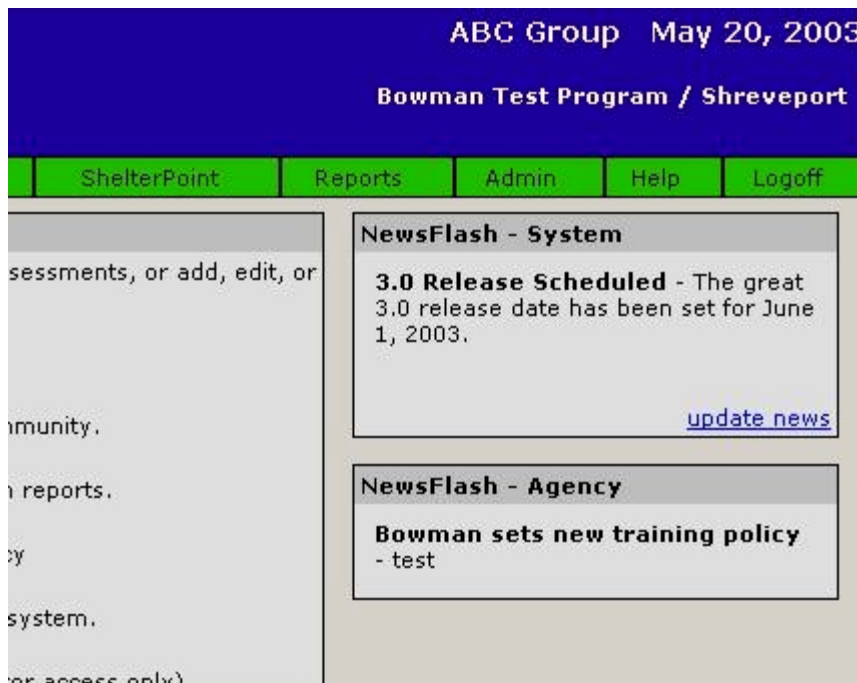
User Administration

Every individual that will use ServicePoint must have a unique user ID and password to gain access to the system. Agency and System administrators have access to create and modify users. Agency administrators may only create and modify users for their own agency.

> **Help:** Always assign Level I access to Agency Administrators, Executive Directors, and System Operators. If they have an assigned level below Level I, they will not be able to fulfill their administrative functions since Level I will be shut off to them.

To create a new user

- Click Admin on the navigation bar.

- Click Users from the administration screen.

- Click Add New User at the top of the user list screen.

- Enter the following information.

    1. Name: Enter the full name of the user.

    2. Provider: Click Provider Search to select the Provider associated with this User. If you logged on as an Agency Administrator, this field displays your agency and all attached providers (Levels II, III, etc.). Otherwise, only Providers attached to the ServicePoint User in the provider profile shows.

    3. Login: Enter a unique login name for this user. Login IDs must be unique. If the login ID assigned is in use, the system will indicate this.

    4. Password: The agency administrator assigns a temporary password. WRITE this down! You will need to provide this password to the user. During the first login by the user, he/she must choose a password to replace this generated password.

    5. Access Level: Choose an access level for this user. A description of each access level is below.

    6. User Expiration: This field is optional. If this user needs temporary access to the system, enter an expiration date. Automatic deactivation of the account will occur on that date.

    7. State: Select either Active or Inactive. Inactive accounts cannot login to the system. If a user has four consecutive bad logon attempts, the system will automatically mark the account inactive. If a user reports not being able to log on, administrators should look here first.

    8. Code Sets Allowed: Select the code sets this user can access.

> **Note:** There are separate license costs associated with each code set. The CPT codes are available through the American Medical Association and the DSM IV codes are available through the American Psychiatric Association. Wisconsin only uses only the AIRS Taxonomy.

- Click Save Changes to create the user.

To edit or change user's password

- Click Admin on the navigation bar.

- Click Users from the administration screen.

- Find the user account in the user list and click on the user's name.

- You may change any of the information shown except for provider. To reset a user's password, click Generate New Password. Be sure to write down the user's new password. The next time they logon, they enter their own unique password.

- It would be helpful if a user could log in under one entity's account and have the ability to select various programs or sites to record data during that session. This is now possible with ServicePoint. Under the entity/Provider, a user may enter data for various 'Child Providers.'

   In the sub-assessment 'Providers this user may enter data as,' click the 'Add Provider' button. Select the 'Child Providers' for which the user may enter data. Each time the user initially enters the System to enter data, the Provider that appears as the default is the one selected in setting up the password. The user may then select an alternate 'Child Provider' to enter data.

- Click Save Changes

Access Levels-

Resource Specialist I	Access is limited to the ResourcePoint module. This role allows the user to search the database of area agencies and programs and view the detail screens for each agency or program. Access to client or service records is not given. A Resource Specialist cannot modify or delete data.
Resource Specialist II	The same access rights as Resource Specialist I, however, this person is considered an agency-level I&R Specialist who updates their own agency and program information.
Resource Specialist III	The same access rights as Resource Specialist II, however, this person is a system-wide I&R Specialist who can update any agency or program information. This access level can also edit the system-wide news.
Volunteer	Access to ResourcePoint module is limited access to ClientPoint, and limited access to service records. A volunteer can view or edit basic demographic information about clients (the profile screen), but is restricted from viewing detailed assessments. A volunteer can enter new client records, make referrals, or check-in/out a client from a shelter. Normally, this access level allows a volunteer to complete the intake and then refer the client to agency staff or a case manager.
Agency Staff	Agency staff has access to ResourcePoint, limited access to ClientPoint, full access to service records and access to most functions in ServicePoint. However, Agency Staff can only access basic demographic data on clients (profile screen). All other screens are restricted, including assessments and case plan records. They have full access to service records. Agency Staff can also add news items to the newswire feature. There is no reporting access.
Case Manager	Case Managers have access to all features excluding administrative functions. They have access to all screens within ClientPoint, including the assessments and full access to service records. There is full reporting access.
Agency Administrator	Agency Administrators have access to all features, including agency level administrative functions. This level can add/remove users for his/her agency and edit their agency and program data. They have full reporting access. They cannot access the following administrative functions: Assessment Administration, Picklist Data, Licenses, Shadow Mode, or System Preferences.
Executive Director	Same access rights as Agency Administrator, but ranked above Agency Administrator.
System Operators	System Operators have no access to ClientPoint or ShelterPoint. They have no access to reporting functions, but do have access to administrative functions. The System Operator can setup new agencies, add new users, reset passwords, and access other system-level options. The system operator helps to maintain the system, but does not have access to any client or service records. The system operator can order additional user licenses and modify the allocations of licenses.
System Administrator I	Same access rights to **client** information (full access) as **Agency Administrator**. However, this user has full access to administrative functions.
System Administrator II	System Administrator IIs have full and complete access to the system. However, this user does not have the option of choosing a Provider other than the default Provider assigned to their ID.

Note: Neither the System Operator nor the System Administrator II have the ability to enter data for multiple providers. The System Operator cannot enter data at all and the System Administrator II can only enter data for the default Provider set at their creation within the system. Conversely, the Agency Administrator can enter data for any Provider within its 'tree' without having to select providers under the heading 'Entering data as "…."

Index of Common Words & Concepts